

HARRIS COUNTY RECORDS CENTER

Records Transfer Instructions

Packing

1. Screen records to ensure that only records that must be retained are sent to storage.
 - a. Remove duplicate copies of documents.
 - b. Remove unused (blank) forms or stationary and publications.
2. Pack records in containers that provide for convenience of access, efficiency and safety?
 - a. Use boxes for letter/legal size documents (approximately 15" x 12" x 10.5" high).
 - b. Containers designed for storage of other files (e.g. checks and microfiche) must be approved by the County Records Manager prior to use.
3. Pack boxes as though they are file drawers and in a logical order (e.g. numerical or alphabetical).
 - a. All files shall face to the front of the box.
 - b. Leave approximately 1.5 inches in the container to allow for easy servicing.
 - c. Do not include files with different retention periods in the same box.

NOTE: Boxes in the following conditions will not be picked up by the Records Center:

- **Torn**
- **Overstuffed/Bulging**
- **Labeled Incorrectly**
- **Not Sealed With a Seated Lid**

Identification Marking

1. Assign each box a unique, **consecutive** number starting where you left off last time.
 - a. Use the same numbering system consistently for each series.
 - b. Coordinate with other records liaisons in your office to ensure that you are not using the same box numbers.
 - c. Include the full box number on the Records Storage Form including any alpha prefixes, e.g. CR-101, HR-PAY-101, TSB-101.
2. Label each box on the short side (front) in the following manner.
 - a. Name of the Office of Record
 - b. Name of the Section within the Office of Record (If applicable)
 - c. Box Number (as determined in item 1 of this section)
 - d. General Description of Contents as listed on the Storage Form (including dates of files)
 - e. If needed, include a detailed list of contents or confidentiality statement in the box (e.g. HIPAA).

Storage Form Submission

1. Complete Record Center **Form 292-002, Records Center Storage Form**.
 - a. Include the name of the Office of Record/section on the "OFFICE" line.
 - b. Place the number of each box in the "BOX NUMBER" column.

- c. Include a short description of contents in the "CONTENTS" column. You can include the **date** the last file was completed or closed out.
 - d. Determine the "SERIES NUMBER" by referencing the Harris County Records Control Schedule.
 - e. Enter the date the last file in the box was closed in the "DATE LAST FILE CLOSED" column.
2. E-mail the completed form to the Records Center (records.center@itc.hctx.net) to schedule an inspection of the records and pick up.

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